



# MōhioForms

## User Guide



# Introduction

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This document contains all essential information for the user to make full use of MōhioForms from the Mōhio product suite. This user guide includes a description of the functions and capabilities of the MōhioForms.

# Abbreviations

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Abbreviation	Full text
PHO	Primary Health Organisation
PMS	Practice Management System (e.g., MedTech or MyPractice)
CVD	Cardiovascular disease
CVR	Cardiovascular disease risk (percentage)
NZGG	New Zealand Guidelines Group
MT32	MedTech32
IRD	Inland Revenue Department
BCTI	Buyer Created Tax Invoice
MOH	Ministry of Health
DHB	District Health Board

# Translations

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Māori	English
Mōhio	To know, understand, realise, comprehend, recognize



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# Mōhio Platform

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Mōhio is a complete end-to-end electronic system for a PHO covering claims, referrals, budget holding, patient management, reporting, data collection and performance.



Mōhio Platform for Practices



# MōhioForms

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MōhioForms is the electronic claiming, referrals, and information collection system. It works alongside the other Mōhio applications like MōhioExpress and MōhioReports.

## |Features

### 1. Real-time and dynamic forms

All forms are dynamically generated and only presents the information required to you. The fields on each form are clearly marked as mandatory if applicable, and all the data is instantly saved back to the Mōhio database in real time on submitting the form.

### 2. Instant Claim Validation

Claims are validated and displayed as the information is entered into the forms and a confirmation is given on submitting the form.

### 3. Integration with PMS

Every form will populate certain fields with information from the PMS and will write back necessary data from the form back into the PMS when it is submitted.

### 4. Standards met

All form functionalities meet the necessary standards. For example, the CVD Risk score assessment calculation has been externally audited and over 1000 unit-tests are applied against the national guidelines with every update.



# How does it work?

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## |Launch

Click on the icon at the bottom of MōhioExpress to launch the MōhioForms. This does require the user to be signed in to MōhioExpress as a prerequisite.

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Click here to open  
MōhioForms

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# Home Page

On launch, the user will be presented with the Home page of MōhioForms where they can see the list of forms available to them, PHO's message of the day and/or any important notices, contact of the Support team and other information such as budgets available to the Practice.

**MohioForms** Menu Provider Patient Form Back Office Budgets Care Plan

**NHC NATIONAL FORMS**

- Alcohol SBI
- DCIP Insulin Start
- Gout Improvement Project
- Mohio CVD/Diabetes 2019
- Patient Classification
- Smoking ABC
- Tu Hauora Assessment
- Tu Hauora Follow-up

**NHC FLEXIBLE FUNDING POOL**

- CVD Triple Therapy (inc Dual ADHB/WDHB)
- Long Term Conditions
- Multidisciplinary Intervention
- Palliative Care
- Podiatry Referral
- Sexual Health - Cervical Smear
- Sexual Health - Long Term Contraception
- Sexual Health - Youth
- Urgent Support Funds
- Waikato Cervical Smear Free
- Waikato Counselling
- Waikato Dental Treatment
- Waikato Extended Consult
- Waikato Heart Disease Monitoring
- Waikato IV Procedure
- Waikato Life Limiting Illness
- Waikato Long Term Contraception
- Waikato Minor Surgery

**Welcome to MohioForms**

[Important Notices](#)

**CVD/Diabetes**  
CVD Risk Assessment and Diabetes Care Improvement for all diabetic patients and others requiring a CVD assessment.  
[Open](#)

**Smoking ABC**  
Smoking Ask, Brief Advice and Cessation Support for all patients 15 years+  
[Open](#)

**Long Term Conditions**  
Long Term Conditions is generally the CarePlus replacement programme for FFP and clinically eligible patients.  
[Open](#)

**NHC Support Team, Website and Reporting**

If you require help please contact one of the following at National Hauora Coalition:

<b>Clinical / Provider Support</b> Our clinical and provider support team is available on 09 950 3325 option 2. <a href="#">Open</a>	<b>Information Support</b> Our information support team is available on 09 950 3325 option 3, or email <a href="mailto:support@mohio.co.nz">support@mohio.co.nz</a>	<b>Auckland Regional Health Pathways</b> <a href="#">Open</a>
<b>Remote Support</b> Please visit our remote support page if one of the support team have asked to connect to your computer. <a href="#">Remote Support</a>	<b>NHC Public Website</b> Visit our website for our latest list of provider, news items and other information. <a href="http://www.nhc.maori.nz">www.nhc.maori.nz</a>	<b>Monthly Reports</b> Practice managers: visit MohioReports to view all of your monthly reports, statistics and payment information online. <a href="#">Mohio Reports</a>

[Park this form](#) [Minimise Form](#) [Submit](#) [Cancel](#)

List of forms and programmes

Contact details of the Support team and links to other PHO services



## |Layout

The user can select a form from the list provided on the Home page of MōhioForms (can revisit this page from any other tab at any time by selecting the **Menu** tab at the top of the window). The selected form will be displayed under the **Form > Main** tab and all other tabs will load information relevant to the form selected by the user.

Information from the PMS will be automatically populated onto all applicable fields of the form making it easier for the user to look at current values before updating them.

Elements on the form (text fields, checkboxes etc) with a yellow background color are mandatory fields and need to be completed before attempting to submit the form. If any element has incorrect information entered into it, the form will alert the user by changing the background color of it to red, and also display hints underneath to assist the user to make a valid entry.

Along with completing the necessary data on the form, the user can also review any Claims or Decision Support that may be of assistance.

The layout of MōhioForms is explained via an example below (form template used: **Mōhio CVD /Diabetes 2019**)





## tab: Provider

Allows the user to fill in their Provider details. This section is mandatory, and all fields have to be filled in before attempting to submit the form.

MedTech users can configure their Provider details under their staff account in MedTech which allows MōhioForms to automatically find and populate this information on to the Provider tab fields, so the user does not have to enter this information every time they open a form.

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MohioForm

MohioForms Menu **Provider** Patient Form Back Office Budgets Care Plan

**Provider Details**

Provider Registration 1212 NZMC/NZNC/Other

First Name System Administrator

Last Name EXT

Provider Type Whanau Support Worker

PMS ID ADM For PMS Only

Logged in: No

**Reference Details**

Your Reference/Inv # INV0000

**Mohio User Details**

Practice DHB Auckland

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Park this form Minimise Form Submit Cancel



## tab: Patient

Patient related information needs to be completed under the Patient tab. Most of the fields will automatically populate information from your PMS if you have entered them in the PMS.

The screenshot shows the MohioForms application window with the 'Patient' tab selected. The interface is divided into two main sections: 'Patient Identifiers' and 'Demographics'. The 'Patient Identifiers' section includes fields for NHI (ABC1235), First Name (BOY), Last Name (MOUSE), Gender (Male), DOB (01/01/1936), CSC Number (0000001204288003), and CSC Expiry (01/01/2023). The 'Demographics' section includes dropdown menus for Ethnic Group 1 (African), Ethnic Group 2, Ethnic Group 3, Priority Ethnicity (African), DHB (Auckland), Quintile (0 (Unknown)), PHO Enrolment Status (Confirmed Enrolment), FFP Status (Ineligible), and NZ Resident Status (New Zealand). There is also an 'Age' field with the value 85 and a 'calculated' label. At the bottom left, there is a 'Logged in: No' indicator. At the bottom right, there are buttons for 'Park this form', 'Minimise Form', 'Submit', and 'Cancel'. The copyright notice '©2021, National Hauora Coalition' is visible at the bottom center.

Field	Value
NHI	ABC1235
First Name	BOY
Last Name	MOUSE
Gender	Male
DOB	01/01/1936
CSC Number	0000001204288003
CSC Expiry	01/01/2023
Ethnic Group 1	African
Ethnic Group 2	
Ethnic Group 3	
Priority Ethnicity	African
DHB	Auckland
Quintile	0 (Unknown)
PHO Enrolment Status	Confirmed Enrolment
FFP Status	Ineligible
NZ Resident Status	New Zealand
Age	85



## tab: Form > Information and Eligibility

Information about the selected form and all eligibility criteria will be listed here.

The screenshot shows the MohioForms interface. At the top, there is a navigation bar with 'MohioForms' and several menu items: 'Menu', 'Provider', 'Patient', 'Form' (highlighted), 'Back Office', 'Budgets', and 'Care Plan'. Below this, a breadcrumb trail shows 'Mohio CVD/Diabetes 2019(4021)' followed by 'Information and Eligibility' (highlighted), 'Main', 'Claims', and 'Decision Support' (with a red notification badge '1').

The main content area has several sections:

- This is our combined CVD and Diabetes form**  
Annual DCIP Diabetes Annual Management review for Diabetics, CVD Risk Assessment for eligible population.
- Eligibility**  
Clinically appropriate as per Cardiovascular Disease Risk Assessment and Management for Primary Care (2018)
- Co-payment information**  
Nil co-payment to patient if claiming under this project.
- Reference documents**
  - [Cardiovascular Disease Risk Assessment and Management for Primary Care \(2018\)](#)
- Patient consent and privacy**  
Please advise patients and have an appropriate consent process in place to use MohioForms. All information entered within these forms is shared with the NHC PHO (including patient identifier and health data).
- For assistance or further information**  
For assistance or further programme information please contact [Provider Support](#) or phone (09) 950 3325.

At the bottom of the content area, there are three buttons: 'Logged in: No', 'Claim: \$', and 'Budget remaining: \$'. To the right of these is the copyright notice '©2021, National Hauora Coalition'.

At the very bottom of the window, there are four buttons: 'Park this form', 'Minimise Form', 'Submit', and 'Cancel'.



## |tab: Form > Main

The selected form will be loaded under this tab. When a user clicks on the form name from the Home page, this tab will open first taking the user straight to the form. The user can see any claim amounts and the budget available at the bottom of the form.

**MohioForms** Menu Provider Patient **Form** Back Office Budgets Care Plan

Mohio CVD/Diabetes 2019(4021) Information and Eligibility **Main** Claims Decision Support 1

Consultation Date: 16/04/2021 (dd/mm/yyyy)

Albuminuria: [dropdown]

TC/HDL Ratio: 1.36 (calculated)

Phlebotomy:  Blood taken in practice

Serum Creatinine: [input] mmo/L

BMI: 25 (calculated) 17/09/2020

Smoking Status: Ex-smoker(<12 mnths) [dropdown]

Weight: 77 kg 19/05/2020

Calculate CVR

Brief advice and cessation  
137S.00 coded on 19/02/2021

Height: 177 cm 19/05/2020

Risk not yet calculated. Please press 'Calculate CVR' above.

Quit date: 11/02/2021 (dd/mm/yyyy)

Correct date?

Waist Circumference: [input] cm

Risk %: [input]

Diabetes Type: No diabetes [dropdown]

Atrial Fibrillation: [dropdown]

Alternative risk scores & management guidance

Last retinal screening: [input] (dd/mm/yyyy)

Pulse Rate: [input] bpm

Require CVD Risk to start Mōhio CVD Risk Projection

None; but referral made?

Rhythm: [dropdown]

IRR(Irregular), NE(Not Examined), REG(Regular)

HbA1c: 52 mmo/mol 12/09/2019

CVD/Diabetes Medication: [dropdown]

Recall (CVR): No recall [dropdown]

BP Today: 0 / 0

Family History: [dropdown]

Recall (DIAP): No recall [dropdown]

BP Previous: 120 / 80 17/09/2020

Prior CVD: [dropdown]

Total Cholesterol: 7.5 mmo/L 06/07/2020

Family History: [dropdown]

Other Risk Factors: [dropdown]

Cholesterol HDL: 5.5 mmo/L 06/07/2020

Prior CVD: [dropdown]

Cholesterol LDL: 2 mmo/L 06/07/2020

If missing due to a high triglyceride please enter 'incalculable'

Other Risk Factors: [dropdown]

Severe Mental Illness: [dropdown]

Logged in: No [dropdown] Claim: \$ Budget remaining: \$

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Park this form Minimise Form Submit Cancel



## |tab: Form > Claims

All claims relevant to the form selected will be displayed here along with their eligibility criteria.

The screenshot shows the MohioForms interface. At the top, there is a navigation bar with 'MohioForms' and several menu items: 'Menu', 'Provider', 'Patient', 'Form' (highlighted), 'Back Office', 'Budgets', and 'Care Plan'. Below this, there are tabs for 'Mohio CVD/Diabetes 2019(4021)', 'Information and Eligibility', 'Main', 'Claims' (highlighted), and 'Decision Support' with a red notification badge '1'. The main content area is titled 'PHO Performance Programme (PPP)' and includes a sub-section 'Smoking Cessation (FFP)'. Under this, there is a 'Claim' checkbox and a list of reasons why a claim might not be generated, such as 'There isn't a budget available to cover this claim' and 'Patient not eligible for FFP funding'. Below this is another sub-section 'CVD Risk Assessment (IIA)' with a 'Claim' checkbox and similar reasons for non-generation. At the bottom of the main content area, there are three buttons: 'Logged in: No', 'Claim: \$', and 'Budget remaining: \$'. The footer contains the text '©2021, National Hauora Coalition' and four large buttons: 'Park this form', 'Minimise Form', 'Submit', and 'Cancel'.



## |tab: Form > Decision Support

Allows in decision making with the help of the Decision Support Tool for the CVD Diabetes Form.

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The screenshot shows a web browser window titled "MohioForm". The navigation bar includes "MohioForms", "Menu", "Provider", "Patient", "Form", "Back Office", "Budgets", and "Care Plan". The main content area is titled "Mohio CVD/Diabetes 2019(4021)" and has tabs for "Information and Eligibility", "Main", "Claims", and "Decision Support" (which is active and has a red notification badge with the number "1").

**Patient aged 75 years or over**

All calculations outside the age ranges of the Framingham equation are approximations. An assessment of the balance between the risks and benefits of treatment is more difficult in older than in younger people; please see the guidelines linked below for further information. Refer to the [guidelines document](#) for more information.

Logged in: No ▲   Claim: \$   Budget remaining: \$

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At the bottom of the window, there are four buttons: "Park this form", "Minimise Form", "Submit", and "Cancel".



## |tab: Back Office

The Back Office tab shows the behind-the-scenes debugging information sent to NHC PHO.

The screenshot shows a web browser window titled "MohioForm" with a navigation menu including "Menu", "Provider", "Patient", "Form", "Back Office", "Budgets", and "Care Plan". The "Back Office" tab is active, displaying a section titled "Debugging and Performance Metrics". A light blue banner states: "This tab shows you the behind-the-scenes debugging information sent to NHC PHO". Below this is a table with two columns: "Metric Name" and "Value".

Metric Name	Value
Tests	<a href="#">Start Install Test</a>
Tests	<a href="#">Start Full Test</a>
Speed Tests	<a href="#">Open Speed Test</a>
Keypresses	2
Clicks	10
Browser - Dimensions - Screen	1680x1050
Browser - Dimensions - Browser	787x719
Browser - UserAgent	Mozilla/5.0 (Windows NT 6.2; WOW64) AppleWebKit/537.22 (KHTML, like Gecko) Chrome/25.0.1364.152 Safari/537.22
Timing - Document Open	Fri Apr 16 2021 16:08:33 GMT+1200 (New Zealand Standard Time)
Timing - Document Ready	Fri Apr 16 2021 16:08:34 GMT+1200 (New Zealand Standard Time)
Timing - Document Ready End (ms)	218
Trusted Site	Non-IE Browser
Language	en-US

At the bottom of the window, there are four buttons: "Park this form", "Minimise Form", "Submit", and "Cancel".



## tab: Budgets

Shows all available budgets for the Practice.

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MohioForm — □ ×

**MohioForms**   Menu   Provider   Patient   Form   Back Office   **Budgets**   Care Plan

### Budgets

This tab shows all available budgets for your practice. (Show details )

Budget Name	Budget Description	Initial Amount	Amount Available	Start Date	End Date
-------------	--------------------	----------------	------------------	------------	----------

Logged in: No ▲

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Park this form   Minimise Form   Submit   Cancel

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## tab: Care Plan

This tab shows the patient's shared care plan.

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MohioForm — □ ×

MohioForms Menu Provider Patient Form Back Office Budgets **Care Plan**

### Shared Care Plan

This is the patients shared care plan. **Note:** This care plan is shared across all MohioForm programmes with the NHC PHO having access to this plan for audit and programme evaluation. It is not visible to other practices at this stage.

[Save to Outbox Document](#) [Return to Form](#)

We recommend saving to and printing the care plan from the Patient's Outbox.

Problems/Needs	Goals	Approaches
<div style="border: 1px solid #ccc; height: 150px;"></div>	<div style="border: 1px solid #ccc; height: 150px;"></div>	<div style="border: 1px solid #ccc; height: 150px;"></div>

Logged in: No ▲

©2021, National Hauora Coalition

[Park this form](#) [Minimise Form](#) [Submit](#) [Cancel](#)

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# Alerts and Prompts

MōhioForms will display any prompts to the user assisting them in completing and submitting the forms successfully.

## Invalid Form

Any time the user attempts to submit a form with invalid or missing information, MōhioForms will display an alert in a pop-up window titled 'Invalid Form (Cannot Submit)'. This window will list the business rules for the form and will address any fields that do not meet these rules.

---

**Invalid Form (Cannot Submit)** ✕

Please review and correct the checklist below before submitting this form. If you wish to continue this form at a later date please park the form.

**Form submission business rules:**

**Provider fields must be complete and error free**

Why isnt this rule met?

- Please switch to the provider tab and correct any fields highlighted in red and complete all fields highlighted in yellow.
- Please enter a known value

**Patient fields must be complete and error free**

Criteria met

**Form fields must be complete and error free**

Why isnt this rule met?

- Please correct any fields highlighted in red, and complete all fields highlighted in yellow.
- [Advised to quit] [Provide information/resources on quitting] is required (or enter "incalculable")

[Close and Return to Form](#)

---

The user can review the information from here and go back to the form by clicking on the button at the bottom, and fix the issues address in the alert.



## |Prompts

Additionally, the user might also be prompted for additional information while completing the form. The below screenshot is an example where the user has to choose a Retinal Screening Referral date. Once selected, the user can click on **Save and Continue** to go back to the form.

---

**Retinal Screening Referral** ✕

You have indicated that this patient has not yet received retinal screening. Please enter the date of referral to retinal screening (or todays date if making a referral).

**Retinal Screening Referral:**

Referral Date

dd/mm/yyyy

inculcable

[Save and Continue](#)

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# Actions

There are buttons at the bottom of the MōhioForms window each associated with an action. These are explained below.

The screenshot displays the MōhioForms application window. At the top, there is a navigation bar with tabs for 'Menu', 'Provider', 'Patient', 'Form', 'Back Office', 'Budgets', and 'Care Plan'. The main content area is titled 'Mohio CVD/Diabetes 2019(4021)' and has sub-tabs for 'Information and Eligibility', 'Main', 'Claims', and 'Decision Support' (with a notification badge '1').

The form contains several sections of data entry:

- Consultation Date:** 16/04/2021 (dd/mm/yyyy)
- Albuminuria:** Dropdown menu
- TC/HDL Ratio:** 1.36 (calculated)
- Phlebotomy:**  Blood taken in practice
- Serum Creatinine:** Input field (mmo/L)
- BMI:** 25 (calculated, 17/09/2020)
- Smoking Status:** Ex-smoker (<12 mnths) (dropdown)
- Weight:** 77 kg (19/05/2020)
- Calculate CVR:** Button
- Height:** 177 cm (19/05/2020)
- Quit date:** 11/02/2021 (dd/mm/yyyy)
- Waist Circumference:** Input field (cm)
- Risk %:** Input field (Note: Risk not yet calculated. Please press 'Calculate CVR' above.)
- Diabetes Type:** No diabetes (dropdown)
- Atrial Fibrillation:** Dropdown menu
- Last retinal screening:** Input field (dd/mm/yyyy)
- Pulse Rate:** Input field (bpm)
- HbA1c:** 52 (mmo/mol, 12/09/2019)
- Rhythm:** Dropdown menu (IRR(Irregular), NE(Not Examined), REG(Regular))
- BP Today:** 0 / 0
- BP Previous:** 120 / 80 (17/09/2020)
- Require CVD Risk to start Mōhio CVD Risk Projection:** Note
- Total Cholesterol:** 7.5 (mmo/L, 06/07/2020)
- CVD/Diabetes Medication:** Dropdown menu
- Recall (CVR):** No recall (dropdown)
- Cholesterol HDL:** 5.5 (mmo/L, 06/07/2020)
- Family History:** Dropdown menu
- Recall (DIAP):** No recall (dropdown)
- Cholesterol LDL:** 2 (mmo/L, 06/07/2020)
- Prior CVD:** Dropdown menu
- Other Risk Factors:** Dropdown menu
- Severe Mental Illness:** Input field

At the bottom of the form, there are buttons for 'Park this form', 'Minimise Form', 'Submit', and 'Cancel'. A status bar shows 'Logged in: No', 'Claim: \$', and 'Budget remaining: \$'. The footer includes the copyright notice '©2021, National Hauora Coalition'.



## | Minimise Form

The user can minimise a form by clicking on this button. The minimised view is as shown in the image below with a button to bring the form back to the normal view.

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## | Submit

This button attempts to submit the form and does it successfully if there are no errors in the form. If it finds an error, an alert is displayed. In the event of a successful submission, information from the form is sent to the Mōhio database and also written back into the PMS.

## | Cancel

Closes the MōhioForms window.



### Park this form

Currently this feature does not work all the time, and as a result the Mōhio Development Team recommends users to not use this button until it's either fixed or removed from the form.

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# FAQs

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**Q: How do I know if I am eligible for a Claim?**

**A:** While in MōhioForms window, select the form from the Home page (Menu tab). Once the form loads, click on the **Form > Claims** tab to view all the available claims for the selected form. You can see the claim amount and the eligibility criteria for each claim available. If you have already submitted the claim, you can re-open the form and view this information.

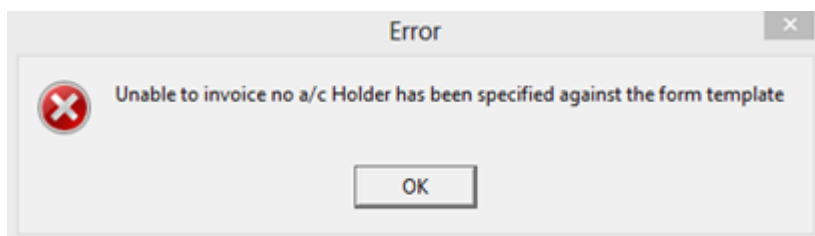
For eligibility guidelines and rules for each programme, or if you need an explanation regarding a claim, please contact your PHO.

**Q: Why am I not able to see a particular form I was expecting in my list?**

**A:** The list of available MōhioForms is determined based on the settings configured for your Mōhio account. If you are not able to see a particular form you were expecting in your list, maybe this form was not added to your account – either intentionally or by mistake. Please contact Mōhio Support to get a clarity on this.

**Q: Why do I get the following error when submitting a form?**

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**A:** MōhioForms require an account to be created in MedTech against which the invoices will be created to. This is part of the Mōhio setup process for the Practice, and the above error message will be thrown if this account has not been specified. The selected MōhioForms will still be submitted, but no invoice will be generated.

In order to fix this, follow the instructions below.

1. In MedTech32, go to **Setup > Advanced Form > Advanced Forms Manager**
2. From the Advanced Forms window, select the appropriate publisher
3. Now from the list of forms, find and double click on the Mōhio advanced form which will be titled 'MōhioForms (Express)'. This will open a new window.
4. Click on the **Actions** tab



5. At the bottom of the window there is a check box titled 'Create Invoice to Account'. Make sure this is ticked, and the appropriate PHO account is selected. (see image below for reference)

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The screenshot shows a window titled "View Advanced Form" for "NHC - MohioForms (Express)". It has several tabs: "Main", "Actions", "Fields", "Field Rules", "Form Rules", "User Settings", and "Audit". The "Main" tab is active. The "User Message:" field is empty. Below it is a "Summary Merge Text:" field, also empty, with a "Send To:" dropdown menu set to "None". There is a checkbox for "Send to HealthLink Folder:" which is unchecked, followed by an empty text field and a browse button "...". Below that is an "Export Format:" dropdown menu. The "Create Invoice to Account:" checkbox is checked and highlighted with an orange box, with a dropdown menu below it showing "NHC (132)" and a browse button "...". At the bottom, there is an "Inactive:" checkbox which is unchecked, and three buttons: "OK", "Cancel", and "Help".

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**Q:** Why do I get the following error when submitting a form?



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**A:** This error message comes up because the service code mentioned in the error message is either inactive or missing from your MedTech application. This service code is required for the selected form to be submitted. The solution is to add the service code mentioned in the error message to your MedTech application.

To do this, follow the instructions below.



#### Note

The instructions below are specific to MedTech32 and the Service MFDNSW.

---

1. Go to **Setup > Accounting > Services**. This opens the Service window.
  2. Press **CTRL + N** or click on the icon on the top-left corner of the window to add a new service.
  3. Fill in the following, and click **OK**
    - **Code:** MFDNSW
    - **Description:** WDHB DCIP Nursing Services
    - **Service Fee:** 0
- 



#### Note

Make sure to enter the **Code** and **Description** exactly as given to you by the Mohio team. For all the services created, enter the **Service Fee** as \$0.00 as MōhioForms will calculate this automatically.

For **MedTech Evolution** users, the Services screen can be accessed by going to **File > Options**, then choose **Accounting > Service**. From there, the instructions are similar to that of MedTech32.

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